

AP Follow User Manual

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AP Follow - An add-in program for the ToDo system in Time Matters

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1. Introduction

1.1. What is the AP Follow?

AP Follow is an add-in program for Time Matters that is the heart of the AP Follow System. This system allows you to deal with a common barrier to getting more done: Waiting on responses from other people. The AP Follow system uses Follow Up fields and the AP Follow program to automatically create reminder or Follow Up records in your ToDo list. This guide shows you how to use the AP Follow System and how to customize your Time Matters to make it work. AP Follow is sold for \$18 per concurrent user by Active Practice LLC.

To order AP Follow, go to: <http://www.activepractice.com/products>

1.2. Why Use the AP Follow System?

Time Matters already has a method for following up on things you need to do. The "Follow" checkbox in a Time Matters record can be checked, causing its Date field to be updated daily to today's date. This Follow feature makes your old ToDo's show up in today's ToDo section of your Time Matters Calendar.

The Time Matters "Following" feature has these disadvantages:

1. Your list of Today's ToDo's can become overwhelming.
2. You cannot see the original date of each ToDo.
3. You cannot choose a specific future date for a Follow Up.
4. You cannot easily see which ToDo's have become stale.
5. Records checked "Follow" are scattered across multiple lists.

The AP Follow System offers these advantages:

1. You set the best future date for a Follow Up.
2. You can quickly set a Follow Up from any dated record.
3. Follow Ups for ToDo's, Events, Documents and more appear together on your ToDo List.
4. The Date stays the same on the original records.
5. Follow Ups are easily distinguished from other kinds of ToDo's.

1.3. Simplicity and Consistency

The keys to succeeding with a ToDo system are simplicity and consistency. The system needs to be simple enough that you will find it relatively effortless to use and keep up to date. If it is too complex, you may become discouraged and find yourself neglecting the system. Your consistency in using the ToDo system is the second key to success. Because it is simple and fast, you can work with it every day with little effort.

1.4. Peace of Mind

It is a great feeling to know you have all the important things you need to do captured in your ToDo system. When

you get to the point where you trust yourself to use your system regularly, you will trust your system. You will feel confident about handling your work. One lawyer who did not have a good ToDo system described lying in bed on a Saturday night, wondering if there was some deadline he had missed that week. For that lawyer, peace of mind is the greatest reward from working with a trustworthy ToDo system.

2. How to Use the AP Follow System

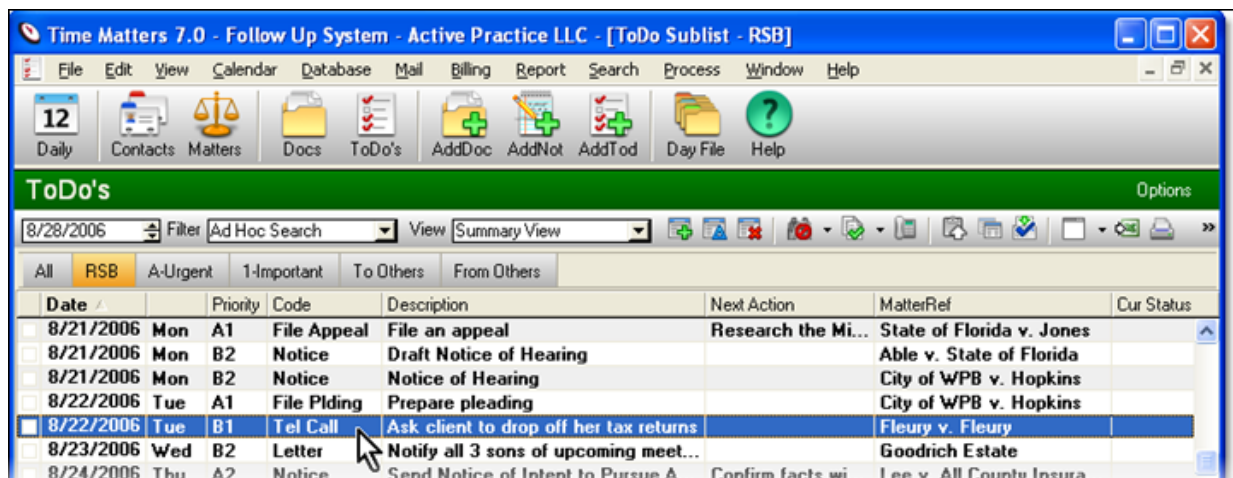
The AP Follow System creates reminders to follow up with other people if you have not heard from them. You can also use it to create reminders to yourself based on Events, ToDo's, Documents, and other records.

Consider this example. You need to review the tax returns of one of your clients. You have a ToDo record in Time Matters: "Ask client to drop off her tax returns." You can call your client and check Done on the ToDo record, but what if your client forgets to give you the returns? If you do not follow up with your client, work on the Matter could stagnate for an indefinite period of time. The Matter could "slip through the cracks." You can best serve your client by being proactive, calling if you have not heard back in, say, 10 days.

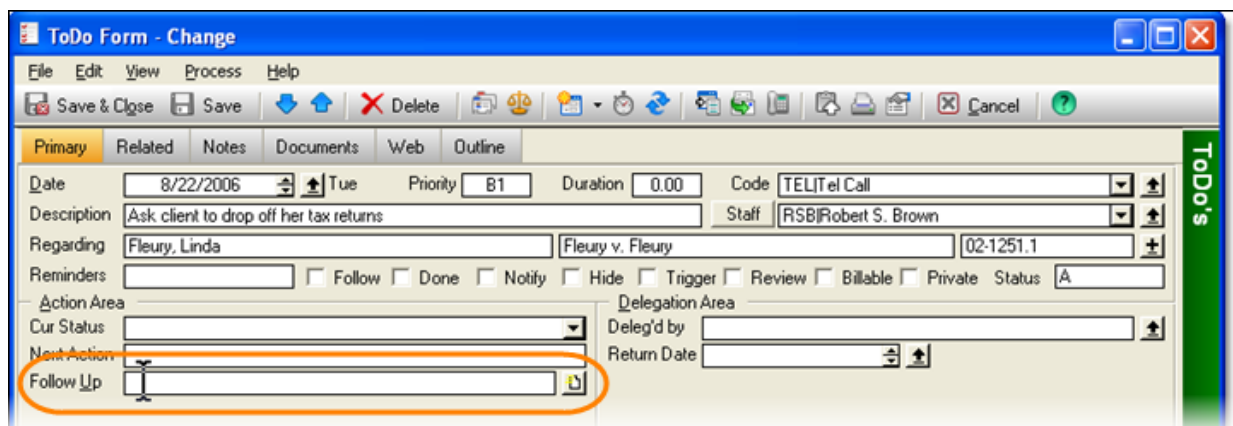
Use the AP Follow System to **create a Follow Up record** when you first realize that you **need to wait on someone else**. That can happen when you create a Document, receive an Email, add a ToDo record to your list, or check an Event on your calendar. You create a Follow Up record that inherits information from one of these records. The Follow Up record goes onto your ToDo list on a future date that you set. When that day arrives, you mark the record Done because the other person has responded or you take action to follow up on it.

Here is how you create a Follow Up record using the AP Follow System:

1. Open a ToDo record you want to follow up on.



2. Click in the Follow Up field.



3. Enter "10" in the Follow Up field, **the number of days from today** for the date of the Follow Up record.

The screenshot shows a form titled 'Action Area' with three input fields: 'Cur Status', 'Next Action', and 'Follow Up'. The 'Follow Up' field contains the number '10'. Below these fields is a 'Memo' section.

4. Press the Follow Up button

This screenshot is identical to the previous one, but a mouse cursor is shown clicking the 'Follow Up' button, which is represented by a small icon to the right of the '10' in the 'Follow Up' field.

5. A new ToDo record appears with these contents created automatically:
 - a. The Date is set for 10 days from today, based on your entering the number 10.
 - b. The Code - FOLL - is entered.
 - c. The Description is copied from the original record and the words "Follow Up" are added at the front.
 - d. The Regarding field are filled in from the original record.

The screenshot shows the 'ToDo Form - Change' window. It has a menu bar (File, Edit, View, Process, Help) and a toolbar with various icons. The form is divided into several sections:

- Primary** (selected tab): Contains fields for Date (9/07/2006), Priority (3), Duration (0.00), Code (FOLL|Follow Up), Description (Follow Up - Ask client to drop off her tax returns), and Regarding (Fleury, Linda).
- Related** tab: Empty.
- Notes** tab: Empty.
- Documents** tab: Empty.
- Web** tab: Empty.
- Outline** tab: Empty.
- Action Area**: Contains Cur Status, Next Action, and Follow Up fields.
- Delegation Area**: Contains Deleg'd by and Return Date fields.
- Chgd/Done**: Contains a date field (8/28/2006).

 Numbered boxes highlight specific fields:

- Box 1: Date field (9/07/2006).
- Box 2: Code field (FOLL|Follow Up).
- Box 3: Description field (Follow Up - Ask client to drop off her tax returns).
- Box 4: Regarding field (Fleury, Linda).

This Follow Up record will appear on your ToDo list dated 10 days from today. If you display ToDo's on your Calendar, the record will also appear there 10 days from today. Using the AP Follow System allows you to follow up systematically on things you are waiting for from other people. It also allows you to quickly create reminders

when you are working with various records in Time Matters. Because AP Follow automatically copies the Description and Regarding information and sets up the rest of the Follow Up record, you can use it quickly. That makes it more likely that you will make a habit of creating Follow Ups.

3. Setup Guide for AP Follow

A number of changes to Time Matters are needed to make the AP Follow System work. Each Time Matters database may have different customizations to its fields. To avoid overwriting your existing customizations, AP Follow does not have a Setup program that overwrites your Form Styles. Instead, you need to customize the Default Form Styles for Events, ToDo's and other dated records you want to follow up on. You also add one new Classification Code for ToDo's and copy the AP Follow program file.

Before making any changes, please:

1. Obtain permission if necessary from your organization before customizing Time Matters.
2. Back up your Time Matters database.

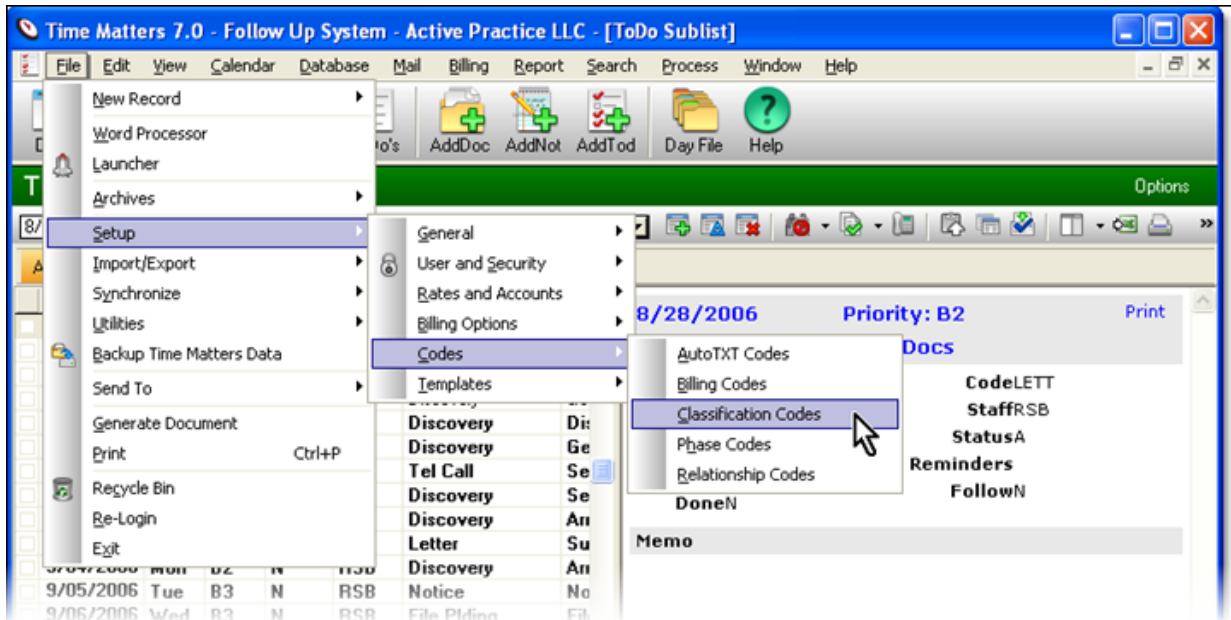
It may appear that you need to make a lot of changes. In fact, the Setup process involves just three kinds of changes:

1. Add a Classification Code for ToDo's
2. Customize a Follow Up field for each kind of record for which you want to follow ups
3. Copy the program, apfollow.exe, to your Time Matters program folder

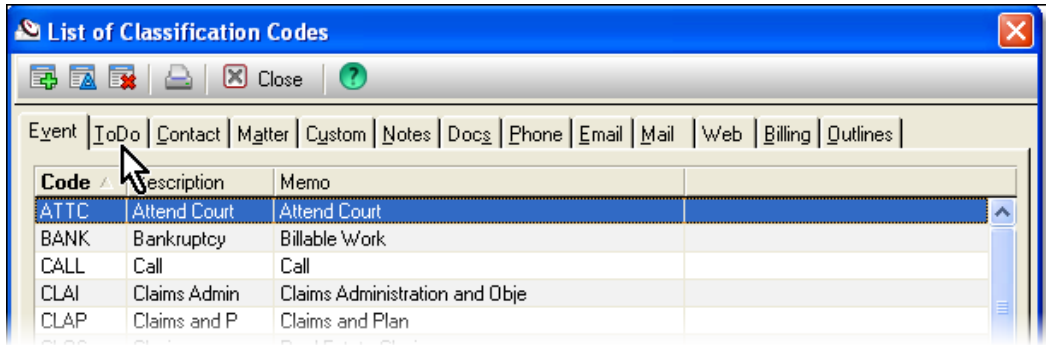
3.1. Add a Classification Code

Add a Classification Code for ToDo's: FOLL | Follow Up

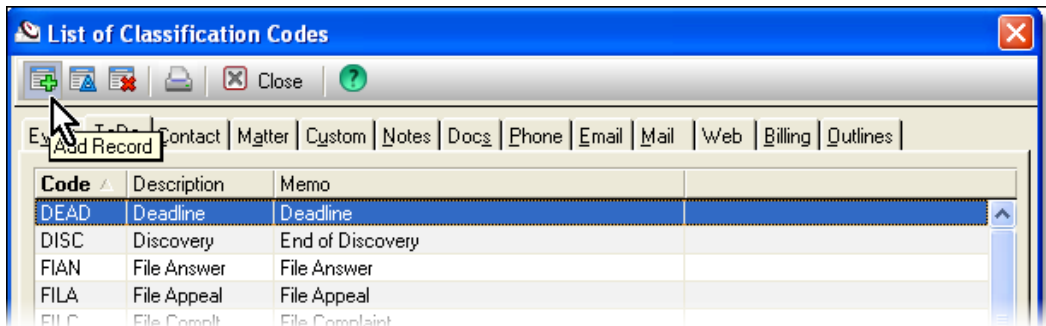
1. Go to: File | Setup | Classification Codes



2. Select: ToDo



3. Add Record



4. Fill in: FOLL and Follow Up. Press OK.

Code: FOLL Description: Follow Up

Memo:

AutoEntry

Code will have the following color: Classification Code Select

No Attached Form Style

Additional Code Settings

Reminders

Duration: 0.00 ☐ Following Initially "On"

Priority: ☐ Hide

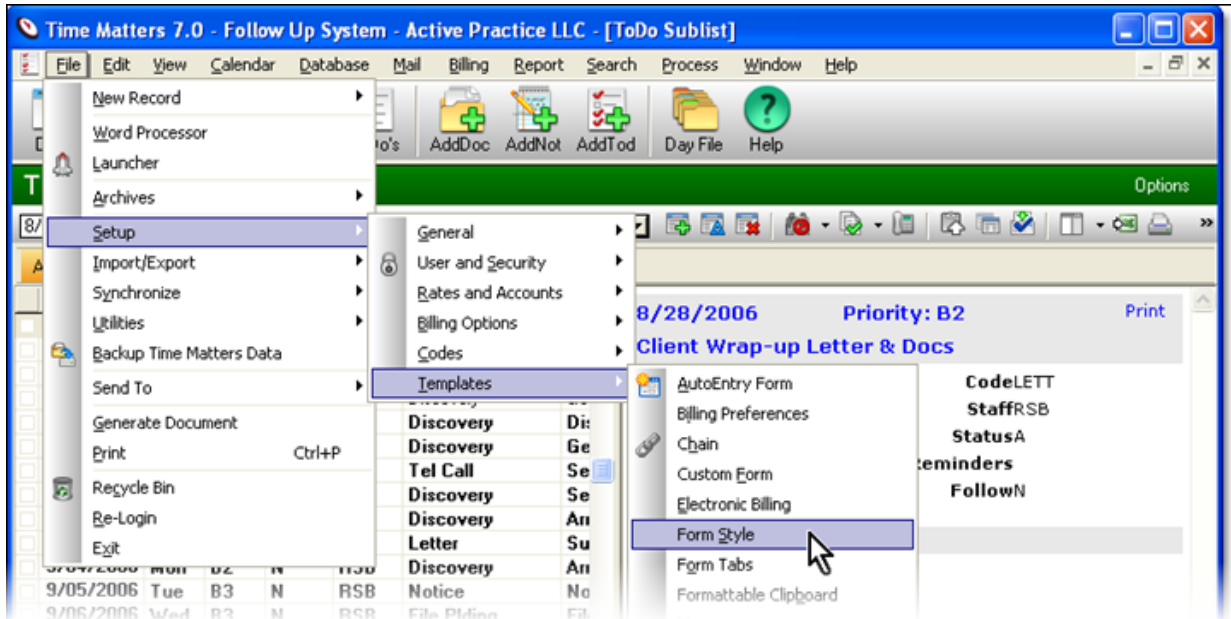
Matching Billing Code

Help OK Cancel

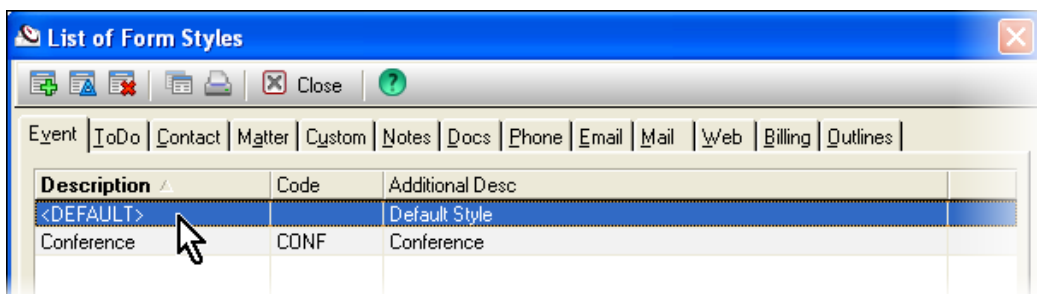
3.2. Customize the Event Form Style

Customizing a User field on the Event Form will allow you to quickly create a Follow Up ToDo record reminding you to take some action concerning an Event on your calendar. You can also customize other types of forms, such as Document, Email and Phone forms, by following the same steps.

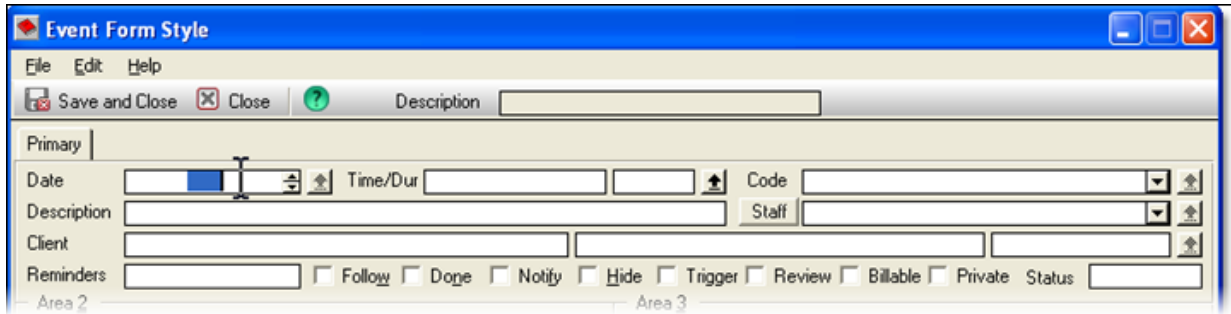
1. Go to: File | Setup | Templates | Form Style



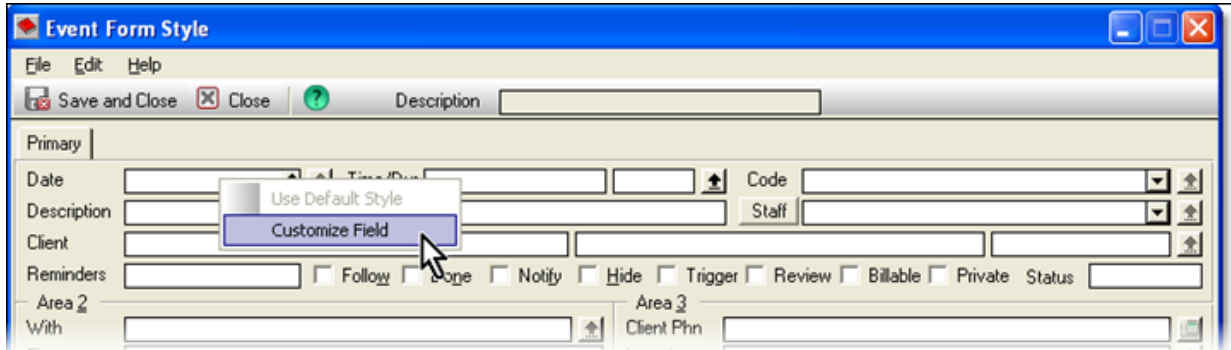
2. Open the Default Style for Event



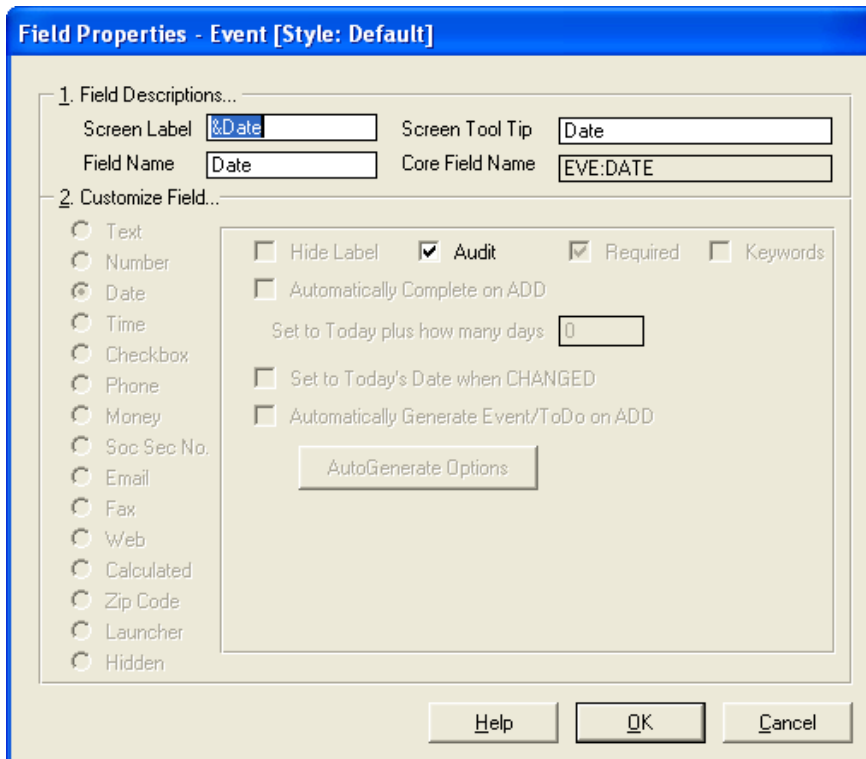
3. Right-click on the Date field.



4. Click: Customize Field



5. Insert & at the start of the Screen Label. **Important** - AP Follow requires this change.



6. Create the Follow Up field by right-clicking on, for example, User3. You may use another User field if User3 is already taken.

Note: If your Time Matters database has multiple Form Styles for a form, you should check each of these

custom Form Styles to see that the User3 field, or other field you have chosen, is available for use in each of the custom Form Styles. You do not have to use the same User field in every form, but that is desirable.

7. Click on: Customize Field

8. Enter the Field Descriptions:

Screen Label: Follow &Up

Screen Tool Tip: Enter no. of days-Press button

Field Name: FollowUp

Field Properties - Event [Style: Default]

1. Field Descriptions...

Screen Label: Follow & Up Screen Tool Tip: Enter no. of days-Press button

Field Name: FollowUp Core Field Name: EVE:EVE1_04_03

2. Customize Field...

☒ Text ☐ Hide Label ☐ Audit ☐ Required ☐ Keywords

☐ Number ☐ All Caps ☐ Spell Check

☐ Date ☐ Specify Field Entry Choices

☐ Time

☐ Checkbox

☐ Phone

☐ Money

☐ Soc Sec No.

☐ Email

☐ Fax

☐ Web

☐ Calculated

☐ Zip Code

☐ Launcher

☐ Hidden

Field Lookup Options...

☒ None

☐ Lookup from Event List

☐ Lookup from ToDo List

☐ Lookup from Contact List

☐ Lookup from Matter List

☐ Lookup from Staff List

☐ Lookup from Users List

☐ Lookup from File

9. Choose: Launcher and enter the Prefix: c:\tmw7\apfollow.exe

Note: Use c:\tmw7 if you have Time Matters Professional or c:\tmw7e if you have Time Matters Enterprise. This is the place where you will copy or download the file, apfollow.exe

Field Properties - Event [Style: Default]

1. Field Descriptions...

Screen Label: Follow & Up Screen Tool Tip: Enter no. of days-Press button

Field Name: FollowUp Core Field Name: EVE:EVE1_04_03

2. Customize Field...

☐ Text ☐ Hide Label ☐ Audit ☐ Required ☐ Keywords

☐ Number ☐ Prompt Before Launching

☐ Date ☐ Save Before Launching ☐ Close After Launching

☐ Time

☐ Checkbox

☐ Phone

☐ Money

☐ Soc Sec No.

☐ Email

☐ Fax

☐ Web

☐ Calculated

☐ Zip Code

☒ Launcher Prefix: c:\tmw7e\apfollow.exe

☐ Hidden Suffix:

10. Here is how the Follow Up field will look:

Area 4

User1

User2

Follow Up

User4

User5

User6

Memo

11. Save & Close the Event Form Style

3.3. Customize the ToDo Form Style

Customizing the ToDo Form Style will allow you to quickly create a Follow Up ToDo based on an existing ToDo record. You will find this useful when you complete a task, but now need to wait on someone else to do something. A Follow Up record will remind you to check with them. Or you can use a Follow Up to remind yourself to do something related to a task you have just completed.

1. Select ToDo from the List of Form Styles

List of Form Styles

Event | **ToDo** | Contact | Matter | Custom | Notes | Docs | Phone | Email | Mail | Web | Billing | Outlines

Description	Code	Additional Desc
<DEFAULT>		Default Style
Conference	CONF	Conference

2. Double-click on the Default Style for ToDo

List of Form Styles

Event | **ToDo** | Contact | Matter | Custom | Notes | Docs | Phone | Email | Mail | Web | Billing | Outlines

Description	Code	Additional Desc
<DEFAULT>		Default Style

3. Right-click on the Date field

Area 2

Date

Priority

Duration 0.00

Code

Staff

Client

Reminders

Follow Done Notify Hide Trigger Review Billable Private Status

Area 3

4. Select: Customize Field

The screenshot shows a software interface titled 'AP Follow User Manual'. It features a form with several input fields and checkboxes. A context menu is open over the 'Date' field, displaying two options: 'Use Default Style' and 'Customize Field'. The 'Customize Field' option is highlighted by the mouse cursor. The form includes fields for 'Date', 'Description', 'Client', 'Reminders', 'Priority', 'Duration' (set to 0.00), 'Code', 'Staff', and a row of checkboxes: 'Follow', 'Done', 'Notify', 'Hide', 'Trigger', 'Review', 'Billable', 'Private', and 'Status'.

5. Insert & at the front of the Screen Label

The screenshot shows a dialog box titled 'Field Properties - ToDo [Style: Default]'. It is divided into two main sections. The first section, '1. Field Descriptions...', contains fields for 'Screen Label' (set to '&Date'), 'Screen Tool Tip' (set to 'Date'), 'Field Name' (set to 'Date'), and 'Core Field Name' (set to 'TOD:DATE'). The second section, '2. Customize Field...', features a list of field types on the left: Text, Number, Date (selected), Time, Checkbox, Phone, Money, Soc Sec No., Email, Fax, Web, Calculated, Zip Code, Launcher, and Hidden. To the right of this list are several checkboxes: 'Hide Label', 'Audit' (checked), 'Required' (checked), 'Keywords', 'Automatically Complete on ADD', 'Set to Today plus how many days' (with a value of 0), 'Set to Today's Date when CHANGED', and 'Automatically Generate Event/ToDo on ADD'. An 'AutoGenerate Options' button is located below these checkboxes. At the bottom of the dialog are 'Help', 'OK', and 'Cancel' buttons.

6. Right-click on the User3 field. You may use another User field if User3 is already taken.

7. Select: Customize Field

8. Enter the Field Descriptions:

Screen Label: Follow &Up

Screen Tool Tip: Enter no. of days-Press button

Field Name: FollowUp

Field Properties - ToDo [Style: Default]

1. Field Descriptions...

Screen Label Screen Tool Tip

Field Name Core Field Name

2. Customize Field...

☐ Text
☐ Number
☐ Date
☐ Time
☐ Checkbox
☐ Phone
☐ Money
☐ Soc Sec No.
☐ Email
☐ Fax
☐ Web
☐ Calculated
☐ Zip Code
☒ Launcher
☐ Hidden

☐ Hide Label ☐ Audit ☐ Required ☐ Keywords
☐ Prompt Before Launching
☐ Save Before Launching ☐ Close After Launching

Prefix

Suffix

Help OK Cancel

9. Choose: Launcher and enter the Prefix: c:\tmw7\apfollow.exe

Note: Use c:\tmw7 if you have Time Matters Professional or c:\tmw7e if you have Time Matters Enterprise. This is the place where you will copy or download the file, apfollow.exe

Field Properties - ToDo [Style: Default]

1. Field Descriptions...

Screen Label Screen Tool Tip

Field Name Core Field Name

2. Customize Field...

☐ Text
☐ Number
☐ Date
☐ Time
☐ Checkbox
☐ Phone
☐ Money
☐ Soc Sec No.
☐ Email
☐ Fax
☐ Web
☐ Calculated
☐ Zip Code
☒ Launcher
☐ Hidden

☐ Hide Label ☐ Audit ☐ Required ☐ Keywords
☐ Prompt Before Launching
☐ Save Before Launching ☐ Close After Launching

Prefix

Suffix

Help OK Cancel

10. Here is how the Follow Up field will look:

The screenshot shows a form titled 'AP Follow User Manual'. It contains several input fields: 'Action Area' (a text box), 'Cur Status' (a dropdown menu), 'Next Action' (a text box), 'Follow Up' (a text box with a small icon to its right), and 'Memo' (a large text area at the bottom).

11. Save & Close the ToDo Form Style

3.4. Customize Other Dated Form Styles

You may add the Follow Up field to all other dated Forms that you use in Time Matters. We recommend you consider adding the field to these Dated Forms:

- Notes
- Docs
- Phone
- E-Mail
- Mail

There are other dated Forms, but it makes less sense to have Follow Up fields on them.

The steps for customizing these other forms are just like the steps for customizing the Event and ToDo Form Styles shown above. Be sure to customize the Date field in each Form Style so that the Screen Label has the entry, &Date -- UPDATE: No change is needed for the Date field in Notes, Phone, E-Mail and Mail.

3.5. Copy apfollow.exe to Your Time Matters Program Folder

If you use Time Matters Professional, your Time Matters Program folder is normally: c:\tmw7 (where 7 is your version of Time Matters).

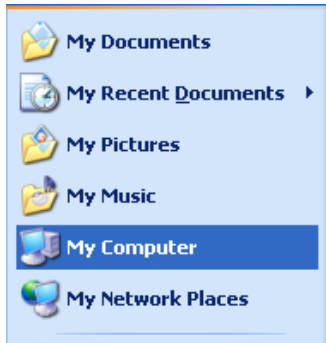
If you use Time Matters Enterprise, your Time Matters Program folder is normally: c:\tmw7e.


The AP Follow program file, apfollow.exe, needs to be copied into your Time Matters program folder. You can do this by downloading it directly into the folder or by copying it using Windows Explorer or My Computer.

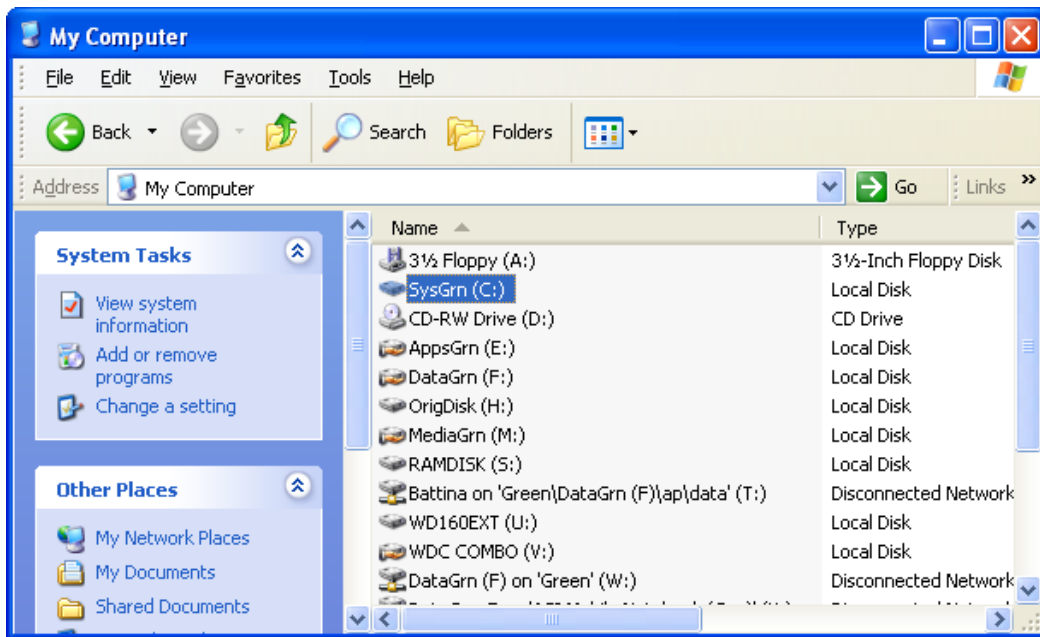
If you are familiar with drag-and-drop copying, just drag apfollow.exe from its current location and drop it into the Time Matters program folder on your PC using Windows Explorer. Otherwise, you can follow these step-by-step instructions for copying the file.

To copy apfollow.exe using My Computer:

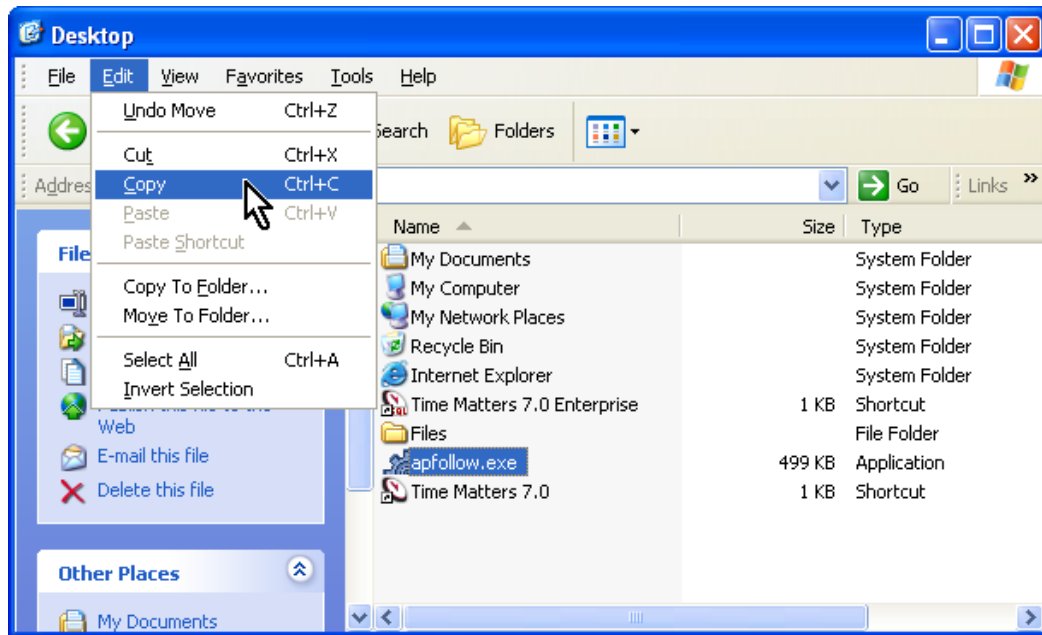
1. Press the Start button, then click on My Computer



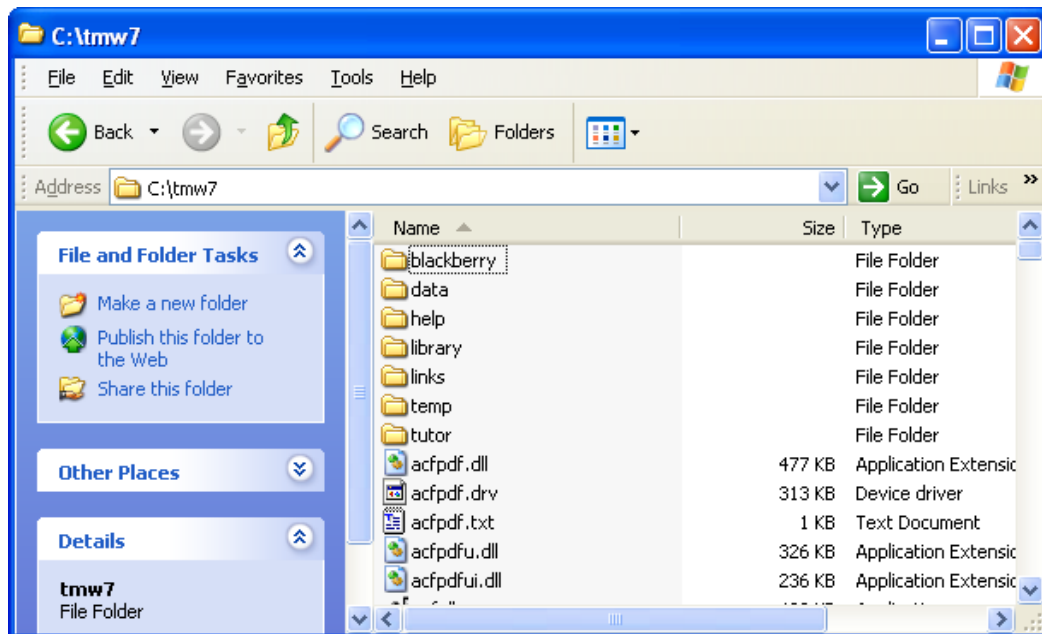
2. Double-click on the C: drive or other drive and go to the folder where you downloaded apfollow.exe. If you downloaded it to the Desktop, you can press the Up icon  repeatedly until you see the Desktop.



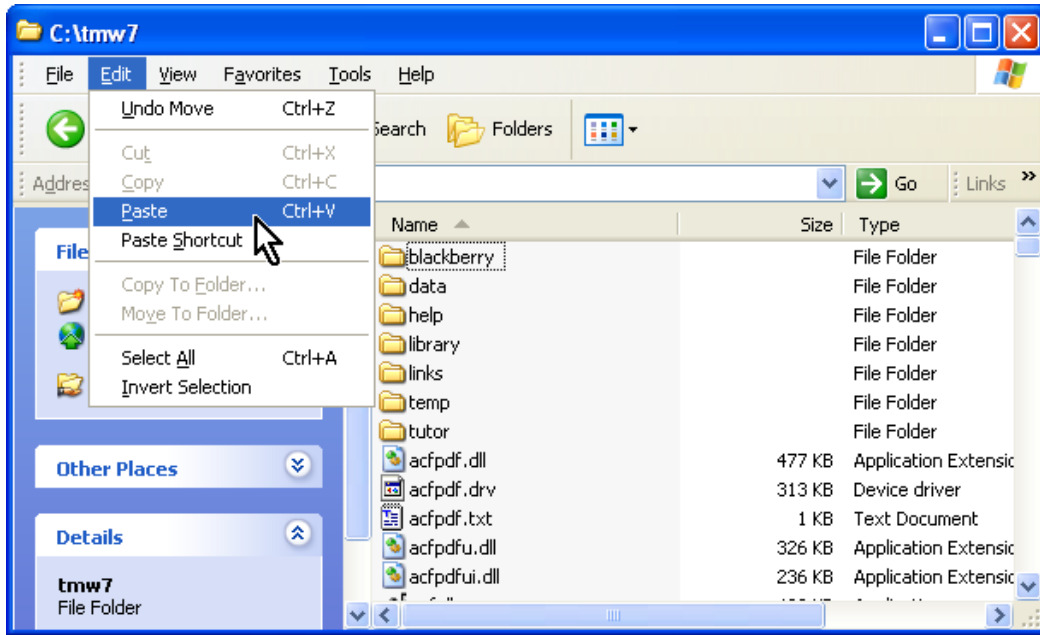
3. Click on apfollow.exe and press Edit | Copy to copy the file.



4. Go to the Time Matters program folder by double-clicking on My Computer | C: drive | tmw7 (or tmw7e for Enterprise)



5. Press Edit | Paste to copy the file into the folder



3.6. Test the Customizations

After customizing your Time Matters database and copying the apfollow.exe file to the Time Matters program folder, you can test these customizations. Go to Section 2 of these instructions, How to Use the AP Follow System.

If nothing happens when you press the button for the Follow Up field, it means that there is a problem either with the Follow Up field customization or the location of the apfollow.exe program. The entry in the Prefix field of the customization window for the Follow Up field must exactly match the location of the apfollow.exe program.

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- No activation
- No missing features
- No nag screens
- No expiration technology (though unregistered use is legally limited to 30 days)
- No "phone-home" features
- No advertisements

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AP Follow User Manual

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